Banner Finance Self-Service

Configure

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My Requisitions

Updated: August 27, 2020

My Requisitions allows you to create and submit a purchase requisition. You can create a purchase requisition using either document-level or commodity-level accounting.

You can also use this application for the following:

- Save requisition as a draft (Draft status)
- Edit a draft requisition and submit a draft requisition
- Delete a draft requisition
- View requisition status
- Copy a completed requisition
- Add comments (public and private)
- Add and delete attachments using Banner Document Management
- Recall your requisition from Banner Finance Self-Service approvals
- Search and filter requisitions you have created
- Order returned search data
- View a requisition as a PDF

My Requisitions status

Updated: August 14, 2024

A status indicates the state of a purchase requisition.

Status	Description
Draft	Requisition previously saved as a draft and awaiting final submission. You can edit and submit.
Pending	Requisition is pending approval in one of the Banner

Status	Description
	Finance Self-Service approval queues.
Disapproved	Requisition submitted but disapproved by a Banner Finance Self-Service approver. The approver can provide Disapproval Text explaining why the requisition was disapproved. You can edit disapproved requisitions and resubmit them.
Completed	• Completed = Requisition approved and posted. • Converted to PO = Requisition items have been converted to Purchase Orders. • Assigned to Buyer = Requisition assigned a buyer code, making the buyer responsible for it. • Closed = All Requisition items are closed. • Cancelled = Cancelled Requisition.

My Requisitions pages

Updated: August 27, 2020

This section describes the My Requisitions pages and the tasks you can perform using these pages.

My Requisitions page

Updated: August 27, 2020

The My Requisitions page serves as the home page. Use this page to create requisitions and view requisitions you have created.

My Requisitions is separated into three sections:

- Draft Requisitions

- Pending Requisitions
- Completed Requisitions

Requisitions appear in each section if available. The number of requisitions in each section is listed after the section's title. By default, only two requisitions are listed when a section contains more than two. To view more requisitions, click **View More**.

Clicking the information icon next to a requisition's status provides a summary window of information for the requisition. This window can also contain comments. For example, if a requisition is disapproved, the user who disapproved it can add a comment explaining why the requisition is disapproved.

You can click anywhere on the selected document row to view the requisition’s detailed information.

Requester Information page

Updated: August 27, 2020

The **Requester Information** page allows you to specify who is creating the requisition.

For user convenience, field information on this page is already completed and defaults from the requester's Banner Finance Self-Service User Profile (FOMPROF).

You can accept the default values provided or select alternate values if needed. You can provide an explanation or justification for the requisition by adding comments or an attachment.

Also, you have the option to select the requisition's accounting type (Document or Commodity), if that option for user choice has been configured when the application was deployed.

Vendor Information page

Updated: August 27, 2020

In the **Vendor Information** page, you define the vendor for the purchase requisition.

Selecting a vendor is optional. You can select the **Choose vendor for me** check box to let your Procurement Office select the vendor. The administrator has the ability to default the

Choose Vendor for Me check box as selected or cleared.

The page also contains fields defining the default discount terms and the vendor's base currency.

Add Item & Accounting page

Updated: August 27, 2020

This page allows you to add items and accounting distributions to the requisition.

Page fields enable you to provide and select the data for the accounting distributions (budget line items) to which the request cost will be charged. The application supports document or commodity level accounting. You can also update or delete the accounting distribution.

Commodity information

Updated: August 27, 2020

This page contains the requisition's descriptive information about the goods and services requested.

Page fields include information about the unit of measure, quantity, unit price, and any additional costs, such as shipping and handling. You can add comments for each commodity item, or update or delete the commodity item. You can select a commodity code/description from the lookup or enter commodity information not available in the lookup. You can also update the **Tax** and **Discount** fields.

Attachments page

Updated: August 27, 2020

This page contains a list of the requisition's attachments.

You can add, delete, and view attachments. When viewing any attachment, you can see the document stored in the B-F-DOCS application in Banner Document Management.

My Requisitions tasks

Updated: August 27, 2020

This section contains the tasks you can perform using My Requisitions.

Create a requisition

Updated: August 27, 2020

To begin the purchase process, use the My Requisitions dashboard page to create a purchase requisition.

Procedure

1. On the **My Requisitions** dashboard page, click **Create Requisition**.
2. On the **Requestor Information** page, specify who is requesting the purchase using the available fields if you are not the default requester for the account.
3. Click **Next** to continue to the next page.
4. On the **Vendor Information** page, select the vendor for the requisition.

   By default, the **Choose vendor for me** check box is selected. When selected, the system chooses a vendor for you. Clear the check box if you want to select the vendor.
5. On the **Add Item & Accounting** page, add an item using the **Add Item(s)** field.

   Result: After an item is selected, the page updates with required fields for the selected item.
6. Click **Save**.

   Result: The page refreshes with the item you just added listed below the **Add Item(s)** field in the **Commodities** list. You can click any item in the list to view its details.
7. Repeat steps 4 and 5 as necessary to add additional items to the requisition.
8. Click **Add Accounting**.

   Result: The page refreshes with the required fields for accounting information.

Note: Users cannot bypass a Fixed Assets error condition using My Requisitions if attempting to mix capital expenditure accounts and other expense accounts. A requisition with mixed accounts can be completed on the Banner Finance Requisition (FPAREQN) page.

9. Click **Save**.

   Result: The Requisition Summary updates.

10. Click **Save as draft** if you want to return to the requisition before submitting or **Submit Requisition** to send the requisition for approval.

Copy a requisition

Updated: August 27, 2020

You can copy a completed requisition and use it as a template for a new requisition.

Procedure

1. On the **My Requisitions** dashboard page, click the completed requisition you want to copy.

   Result: The requisition opens on the **Requestor Information** page.

2. Click **Copy Requisition**.
3. On the copy prompt, choose the appropriate option.

Option	Description
Yes	The system copies the requisition and creates an identical new requisition that you can edit.
No	The system cancels the copy.

4. Edit the requisition as appropriate, just as you would a new requisition.

Delete a requisition

Updated: August 27, 2020

You can delete any requisition that is in Draft status.

Procedure

1. On the **My Requisitions** dashboard page, click the requisition in Draft status you want to delete.

   Result: The requisition opens on the **Requestor Information** page.

2. Click **Delete Requisition**.
3. On the delete prompt, choose the appropriate option.

Option	Description
Yes	The system deletes the requisition.
No	The system cancels the delete.

Edit a requisition

Updated: August 27, 2020

You can edit requisitions in Draft status. To edit a requisition in Pending status, you must recall the requisition.

Procedure

1. On the **My Requisitions** dashboard page, click **Draft** in the Status column for the requisition that you want to edit.
2. Using the **Next** and **Back** buttons, edit the Requestor Information, Vendor Information, and Add Item & Accounting pages as necessary.
3. Click **Save as draft** if you want to return to the requisition before submitting or **Submit Requisition** to send the requisition for approval.

Add an attachment to a requisition

Updated: August 27, 2020

After an attachment is created, such as a statement of work, you can add an attachment to the requisition at any time before submitting the requisition. You can add attachments to requisitions in Draft or Disapproved status.

Procedure

1. Open the requisition in **Draft** or **Disapproved** status to which you want to add an attachment.
2. Click **Attachments**.
3. Click **Attach File**.
4. Using the **Attach Documents** prompt, choose a file to attach.
5. Select the **Document Type**.
6. Click **Upload**.

   Result: The file is added to the Attachments page list.

Delete an attachment from a requisition

Updated: August 27, 2020

If you want to delete an attachment from a purchase requisition, you can use the **Attachments** page to delete one or more attachments.

Procedure

1. Open the requisition containing the attachment you want to delete.
2. Click **Attachments**.
3. On the **Attachments** page, click the attachment that you want to delete in the Attachments list, and then click **Delete**.
4. Confirm that you want to delete the attachment.

Recall a requisition

Updated: August 27, 2020

You can recall requisitions that are in **Pending** status.

Procedure

1. On the **My Requisitions** dashboard page, open the pending requisition that you want to recall.
2. Click **Recall My Requisition**.
3. On the recall prompt, choose the appropriate option.

Option	Description
Yes	The system recalls the requisition. The **My Requisitions** dashboard page loads with the recalled requisition placed in the draft requisitions section with a draft status.
No	The system cancels the recall.

View as PDF

Updated: August 27, 2020

You can download the purchase requisition as a PDF file to verify requisition information is correct.

Procedure

1. Open the requisition that you want to view as a PDF.
2. Click **View as PDF**.

   Result: My Requisitions formats the requisition's information into PDF format.
3. Right-click in the PDF file for other options, such as printing or saving the requisition.

Use Extensibility in My Requisitions

Updated: August 27, 2020

You can hide optional page elements or change elements field labels using the Extensibility tool set delivered with the application.

About this task

Use the **Extension Editor**, accessed in **My Requisitions Tools** menu, to configure which elements you want to modify. When the extensions are edited and saved, this configuration is applied uniformly across your site's My Requisitions implementation.

Only users who have a Web Tailor admin role can use the extension editor. For more information about this role, refer to the Finance Web app extensibility section in the *Banner Finance Self-Service Install* documentation.

Note: The `my_requisitions.json` file is included with the release documentation on the Ellucian Documentation site. To download the file, navigate to the *Banner Finance Self-Service Configure* documentation, **Use Extensibility in My Requisitions** topic (this topic), click **More** ⋮, then **Attachment**, and select the file to download.

Procedure

1. Log in to My Requisitions using the Web Tailor Admin role.
2. Click **Tools** and select **Extensibility** > **Edit Extensions**.

   Result: The **Extension Editor** window appears.
3. For the element for which you want to change the label, modify the label in the corresponding JSON code in the **Extension Editor** window as shown in the following examples:
   If you want to change the label from **Public Comment** to **Printable Comment**, the following JSON code must be modified as follows:

   ```
   {"label":"Public Comment"}
   ```

   to

   ```
   {"label": "Printable Comment"}
   ```

4. Use the `exclude` value to specify that an element is displayed or hidden.

   - `"exclude":true` hides the element
   - `"exclude":false` displays the element

5. Based on the needs of your institution, use the JSON files supplied for the all possible extensible elements in My Requisitions.

   You can mix and match sections of the JSON code contained in the provided `my_requisitions.json` file.

   After the JSON returns modifications, make sure they are valid by verifying against any of the available JSON validators.
   For example:

   - http://jsonlint.com/
   - https://jsonformatter.curiousconcept.com/

Query Type	Use JSON Code File
My Requisitions	`my_requisitions.json`

6. Click **Submit** to save the extension.

   Result: A notification center message appears verifying the extension was saved.

7. Refresh the page to verify your changes were made.